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Japan

Livestock and Products

Semiannual Report

2007

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Report Highlights: Japan currently only allows U.S. beef from animals aged 20 months or younger, which severely limits trade. While the Japanese market was partially re-opened in July 2006, imports of U.S. beef only reached 10,458 MT in 2006, a fraction of historic levels. 2007 U.S. beef sales to Japan are forecast at 57,000 MT, primarily due to a limited supply of age-qualified animals in the United States. However, this forecast is highly dependent on policy developments. High beef prices in general will dampen consumption. Pork imports are forecast down 2% to 1.12 million MT in 2007. Increased enforcement of the so called 'gate price' system of collecting import duties will continue to limit imports of frozen pork for processing. The Untied States is expected to continue doing a brisk trade in seasoned ground pork for sausages, which falls outside of the 'gate price' duty system.

Includes PSD Changes: Yes
Includes Trade Matrix: No
Unscheduled Report
Tokyo [JA1]
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Notes

The new PS&D figures in this report are NOT OFFICIAL USDA DATA.

The conversion factors from Product Weight Equivalent (PWE) to Carcass Weight Equivalent (CWE) are:

- Beef and Pork (Generic): 1.43 (1/0.7)
- Prepared and Processed Beef Products: 1.79 (1/056)
- Prepared and Processed Pork Products: 1.43 (1/0.7)

The conversion factor from lbs to kilo: 2.2 (453.592/1000)

Average exchange rate for Japanese yen to U.S. dollar was 116.20 yen in 2006.

Unless specified, volumes described in the text are on a CWE basis as PS&D tables.

Import quantities referenced in discussions of the beef and pork safeguards refer to customs clearance figures as announced by the Government of Japan (GOJ). The safeguard (SG) is monitored and implemented based on the Japanese fiscal year (JFY), which starts April and ends March next year. Other discussions are all based on calendar year (CY) unless it is specified in the text.

Beef Section

2007 Japan Beef Market Outlook

For Policy Reasons, Imports of U.S. Beef to Stay Low in 2007

Post estimates Japan's total beef imports in 2007 will be around 720,000 MT, up by 4% from last year. CY 2007 U.S. beef sales to Japan are forecast up at 57,000 MT.

Japan currently only allows U.S. beef from animals aged 20 months or younger. One large factor in the 2007 import estimate is the ability of the U.S. beef industry to supply cattle that qualify under USDA's EV program, which is used to identify animals that meet the Japanese age restrictions. Currently, a minority of the cattle slaughtered in the United States qualify under this program. The Japanese policy is not based on sound science and is not consistent with international standards. If Japan were to adopt international standards in 2007, it would greatly increase the exportable supply of U.S. beef and would contribute to the United States regaining its historic market share. In May 2007, the OIE (the World Organization for Animal Health) is expected to adopt a new classification for BSE risk in the Untied States. Because the OIE is a recognized standard setting body in the WTO, this change may play a key role in normalizing the beef trade with Japan.

Moreover, Japan's on-going 100% open box inspection policy for U.S. beef started in July 2006 and remains in place. Importers are asked by the Japanese government to open and check all boxes of U.S. beef at the point of import prior to customs clearance, a costly and time consuming process. It is generally agreed that meat importers do not have the physical space or staff needed to perform 100% box inspections for the larger volumes of U.S. beef that are expected to arrive in 2007. This policy will also act as a brake on U.S. beef import in 2007 if it is not changed.

Competition from Australia to Continue

Australian beef imports (not including prepared and processed products) in 2007 will be around 564,000 MT, down by 3% from the previous year. Drought conditions and high grain prices will limit the supply of Australian grain fed beef in 2007, which will partially be replaced by U.S. beef. The number of cattle on feed in Australia is reportedly increasing but high grain prices and feeding costs will hurt competitiveness. At the same time, Japan will face competition from other Asian beef buyers.

High Prices Will Continue

At the projected level of 2007 imports, no price decline is forecast. This will hamper the overall beef recovery in consumption. Along with high domestic beef prices, average monthly CIF prices of imported beef are currently 10 – 15 % over 2003 annual average level and have contributed to overall slump in beef consumption in Japan.

U.S. Beef Gaining Back Ground In HRI and Retail

Trade reports indicate that nearly 3,500 outlets of hotels, restraints, and retailers currently carry U.S. beef and this will expand in 2007. However, major supermarkets are not yet carrying U.S. beef but this is expected to change soon. Acceptance by a national retail supermarket would be an important development because it will signal to other retailers (and Japanese policy makers) that consumer concerns over U.S. beef have faded.

Domestic Production Also Languishing

Japanese beef producers, which in 2006 met about 40% of overall demand, have been unable to capitalize on the limited supply of imported beef for a number of reasons, including an aging farm population, stricter environmental controls, limited space, and very high dependence on imported feed grains, especially on U.S. feed corn, which has become more expensive. Beef producers in Japan have been further hurt by a decline in tariffs collected from beef imports, which are used to provide domestic beef production subsidies. These factors will continue in 2007.

Triggering of Beef Safeguard in JFY 2007 Unlikely

It is anticipated that Japan will keep the same beef safeguard level that was established for JFY 2006. This means that additional duties will not be levied unless beef imports in JFY 2007 exceed an average of JFY 2002-2003 levels or 117% of the previous year imports, whichever is higher.

If the safeguard is triggered, beef tariffs will rise to 50% (from 38.5%) and the higher tariffs will stay in place for the entire fiscal year. (See JA 6069 for additional information).

Table 1. Japanese Beef Safeguard Monitor

Beef Safeguard Trigger Levels for JFY 2006 and Actual Imports					
					Unit: Metric Ton (Customs Clearance Basis)
Chilled Beef	Trigger Level	Cum. Total	April	May	June
	Quarterly Cum.	Actual Entry			
I (Apr. - Jun.)	74,339	57,700	19,525	17,464	20,711
			July	August	September

I - II (Apr. - Sept.)	152,455	111,133	18,264	17,514	17,655
			October	November	December
I - III (Apr. - Dec.)	230,642	173,562	20,032	22,233	20,164
			January	February	March
I - IV (Apr. - Mar.)	292,354	173,562	0	0	0
Frozen Beef	Trigger Level	Cum. Total	April	May	June
	Quarterly Cum.	Actual Entry			
I (Apr. - Jun.)	70,716	67,073	22,881	16,779	27,413
			July	August	September
I - II (Apr. - Sept..)	160,040	121,306	21,127	16,397	16,709
			October	November	December
I - III (Apr. - Dec.)	246,871	182,145	18,622	18,665	23,552
			January	February	March
I - IV (Apr. - Mar.)	323,924	182,145	0	0	0
Beef Safeguard Trigger Levels for JFY 2007 and Actual Imports (Preliminary by Post)					
Unit: Metric Ton (Customs Clearance Basis)					
Chilled Beef	Trigger Level	Cum. Total	April	May	June
	Quarterly Cum.	Actual Entry			
I (Apr. - Jun.)	74,339	0	0	0	0
			July	August	September
I - II (Apr. - Sept.)	152,455	0	0	0	0
			October	November	December
I - III (Apr. - Dec.)	230,642	0	0	0	0
			January	February	March
I - IV (Apr. - Mar.)		0	0	0	0
Frozen Beef	Trigger Level	Cum. Total	April	May	June
	Quarterly Cum.	Actual Entry			
I (Apr. - Jun.)	78,475	0	0	0	0
			July	August	September
I – II (Apr. - Sept.)	160,040	0	0	0	0
			October	November	December
I - III (Apr. - Dec.)	246,871	0	0	0	0
			January	February	March
I - IV (Apr. - Mar.)		0	0	0	0
Note: For JFY 2006 and JFY 2007 beef SG trigger levels, the levels are determined based on a special measure by GOJ as per voluntary report (JA 6069)					
Source: Ministry of Finance (ALIC Monthly)					

2006 Beef Market Situation Summary

Revised cattle and beef PS&D figures for CY 2005 and 2006 are constructed based on preliminary production, trade and stock data available to date.

High Prices Weakened Overall Beef Consumption in 2006

Total imports of U.S. beef in 2006 only reached 10,458 MT (Customs Clearance Basis: 7,321 MT). (See table 8-a). Total beef imports in 2006 were unchanged from last year at 692,000 MT. Modest decline in imports from Australia was offset by a marked reentry of U.S. beef.

Generic beef imports were steady in 2006 at 658,000 MT. Country shares were: Australia (88%), New Zealand (8%), and U.S. (2%). Prepared and Processed Beef Products: 34,000 MT, down by 20%. Counter shares were: Australia (45%), China (34%) and Brazil (12%) and New Zealand (8%)] (See table 8-a, 8-b, 8-c and 8-d).

Total beef consumption in 2006 fell 2% to 1.23 million MT, primarily due to weak consumption brought on by high prices. Household consumption data in particular showed a 4% decline in 2006 (See table 2). The ending stock also rose 18% to 104,564 MT, partly due to an abnormally warm winter (November and December), which hurt sales of hot pot dishes (See table 3).

Throughout 2006, there was high demand for Australian beef and wholesale market prices were higher (See table 5). This appears to have discouraged sales of Australian beef in the retail sector. Food service sector demand was reportedly been solid, especially for fast food chains.

Meat Livestock Australia (MLA) data (See table 7) shows that chilled beef exports to Japan in 2006 were down 6% (grass: down 11%, grain fed: down 3%) while frozen beef exports were up 8% (grass: up 9%, grain fed: up 3%).

Domestic Cattle Slaughter Slightly Fell in 2006

In 2006, total slaughter was down 1% to 1.26 million head mainly due to smaller numbers of dairy steers (down 4%) and Wagyu heifers and cows (down 4%) sent to slaughter in 2006. An increase in dairy cow slaughter (up 4%) occurred due to milk surpluses.

Reflecting weak household consumption, average wholesale market prices for medium grade carcasses other than Wagyu were relatively weaker than the previous year (See table 4).

Table 2. Japanese Household Consumption of Meat, Poultry and Processed Meat

Quantity Consumed (Unit: Grams per Household)					
	2004	2005	% Chg.	2006	% Chg.
Year Total by Item					
Beef	7,113	7,210	1%	6,888	-4%
Pork	17,335	17,259	0%	17,131	-1%
Chicken	10,944	11,596	6%	11,947	3%
Ham	3,078	3,057	-1%	2,971	-3%
Sausage	5,002	4,863	-3%	4,827	-1%
Bacon	1,242	1,282	3%	1,294	1%

Egg	30,867	30,710	-1%	30,993	1%
Amount of Yen Spent (Unit: Yen per Household)					
	2004	2005	% Chg.	2006	% Chg.
Year Total by Item					
Beef	21,102	21,415	1%	20,788	-3%
Pork	23,431	23,039	-2%	23,043	0%
Chicken	10,181	10,728	5%	10,862	1%
Ham	5,874	5,875	0%	5,782	-2%
Sausage	6,406	6,340	-1%	6,324	0%
Bacon	2,079	2,162	4%	2,247	4%
Egg	7,912	8,840	12%	8,353	-6%
Meat Total	74,533	75,318	1%	74,904	-1%
Foods Total	919,970	904,157	-2%	892,116	-1%
Number of Average Household	3.19	3.15	-1%	3.12	-1%
Note: Meat Total is the sum of beef, pork and chicken and ground meat plus ham, sausage, bacon and other fresh meat except for egg.					
Source: Ministry of Internal Affairs and Communications (from Daily Meat and Livestock, Feb. 14)					

Table 3. Japanese Monthly Beef Stock Estimates

					Unit: Metric Ton (Carcass Equivalent)		
Month/Year	**2003**	**2004**	**% Chg.**	**2005**	**% Chg.**	**2006**	**% Chg.**
Jan.	133,924	92,816	-31%	85,716	-8%	88,396	3%
Feb.	133,984	99,883	-25%	87,856	-12%	86,691	-1%
Mar.	138,349	95,441	-31%	91,827	-4%	92,063	0%
Apr.	126,871	88,716	-30%	94,326	6%	96,636	2%
May	122,140	84,867	-31%	104,870	24%	97,596	-7%
Jun.	115,050	83,976	-27%	107,107	28%	104,973	-2%
Jul.	125,347	89,974	-28%	117,334	30%	105,897	-10%
Aug.	114,453	95,267	-17%	113,109	19%	102,733	-9%
Sept.	113,511	94,473	-17%	103,691	10%	100,447	-3%
Oct.	117,189	90,754	-23%	96,687	7%	97,213	1%
Nov.	119,547	91,279	-24%	93,781	3%	106,286	13%
Dec.	109,487	89,390	-18%	88,859	-1%	104,564	18%
Source: ALIC Monthly Statistics							

Table 4. Average Wholesale Price of Medium Grade Domestic Carcass in Tokyo

					Yens per kilo
WAGYU STEER A-3 GRADE					
Year/Month	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Yearly Ave.

2002	887	1,208	1,505	1,724	1,331
2003	1,664	1,668	1,728	1,789	1,712
% Chg.	88%	38%	15%	4%	29%
2004	1,740	1,875	1,897	1,953	1,866
% Chg.	5%	12%	10%	9%	9%
2005	1,949	1,944	1,926	2,088	1,977
% Chg.	12%	4%	2%	7%	6%
2006	1,957	1,986	1,975	2,004	1,981
% Chg.	0%	2%	3%	-4%	0%
WAGYU STEER A-2 GRADE					
Year/Month	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Yearly Ave.
2002	531	964	1,303	1,423	1,055
2003	1,380	1,403	1,476	1,518	1,444
% Chg.	160%	46%	13%	7%	37%
2004	1,550	1,660	1,700	1,735	1,661
% Chg.	12%	18%	15%	14%	15%
2005	1,730	1,712	1,672	1,782	1,724
% Chg.	12%	3%	-2%	3%	4%
2006	1,723	1,711	1,656	1,640	1,682
% Chg.	-0%	-0%	-1%	-8%	-2%
WAGYU Heifer A-3 GRADE					
Year/Month	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Yearly Ave.
2002	871	1,181	1,481	1,716	1,313
2003	1,653	1,649	1,706	1,774	1,696
% Chg.	90%	40%	15%	3%	29%
2004	1,746	1,872	1,908	1,970	1,874
% Chg.	6%	13%	12%	11%	11%
2005	1,957	1,944	1,947	2,106	1,989
% Chg.	12%	4%	2%	7%	6%
2006	1,981	2,000	1,976	2,020	1,994
% Chg.	1%	3%	1%	-4%	0%
Holstein Steer B-2 Grade					
Year/Month	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Yearly Ave.
2002	166	325	515	671	420
2003	500	518	561	671	562
% Chg.	201%	59%	9%	-0%	34%
2004	789	836	770	784	795
% Chg.	58%	61%	37%	17%	41%
2005	828	836	786	886	834
% Chg.	5%	0%	2%	13%	5%

2006	874	903	807	865	862
% Chg.	6%	8%	3%	-2%	3%
Holstein Cow C-2 GRADE					
Year/Month	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Yearly Ave.
2002	99	151	261	372	221
2003	319	364	372	388	361
% Chg.	223%	142%	43%	4%	64%
2004	506	605	574	487	543
% Chg.	58%	66%	54%	25%	50%
2005	507	565	562	536	543
% Chg.	0%	-7%	-2%	10%	-0%
2006	517	528	523	530	525
% Chg.	2%	-7%	-7%	-1%	-3%
F1 Cross Breed Heifer B-3 GRADE					
Year/Month	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Yearly Ave.
2002	449	726	1,120	1,291	897
2003	1,202	1,207	1,240	1,266	1,229
% Chg.	168%	66%	11%	-2%	37%
2004	1,198	1,336	1,384	1,429	1,337
% Chg.	-0%	11%	12%	13%	9%
2005	1,433	1,467	1,460	1,486	1,462
% Chg.	20%	10%	5%	4%	9%
2006	1,455	1,405	1,373	1,412	1,411
% Chg.	2%	-4%	-6%	-5%	-3%
F1 Cross Breed Heifer B-2 GRADE					
Year/Month	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Yearly Ave.
2002	289	568	937	1,012	701
2003	890	871	928	954	911
% Chg.	208%	53%	-1%	-6%	30%
2004	1,014	1,183	1,216	1,214	1,157
% Chg.	14%	36%	31%	27%	27%
2005	1,259	1,320	1,277	1,290	1,287
% Chg.	24%	12%	5%	6%	11%
2006	1,277	1,213	1,110	1,192	1,198
% Chg.	1%	-8%	-13%	-8%	-7%
F1 Cross Breed Steer B-3 GRADE					
Year/Month	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Yearly Ave.
2002	453	737	1,148	1,330	917
2003	1,252	1,235	1,276	1,298	1,265
% Chg.	177%	67%	11%	-2%	38%

2004	1,316	1,356	1,407	1,458	1,360
% Chg.	5%	10%	10%	12%	7%
2005	1,484	1,497	1,498	1,527	1,487
% Chg.	13%	10%	6%	5%	9%
2006	1,487	1,449	1,438	1,463	1,461
% Chg.	0%	-3%	-4%	-4%	-2%
F1 Cross Breed Steer B-2 GRADE					
Year/Month	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Yearly Ave.
2002	304	579	947	1,056	722
2003	922	909	966	999	949
% Chg.	203%	57%	2%	-5%	32%
2004	1,016	1,212	1,248	1,261	1,184
% Chg.	10%	33%	29%	26%	25%
2005	1,292	1,345	1,320	1,334	1,323
% Chg.	27%	11%	6%	6%	12%
2006	1,308	1,247	1,158	1,232	1,236
% Chg.	1%	-7%	-12%	-8%	-7%
Source: ALIC Monthly (Original monthly data converted into quarterly by post)					

Table 5. Average Wholesale Price of Imported Beef (Australian Chilled Cuts)

					Unit: Yen per Kg.
Full Set, Australian Beef, Chilled, (Short Grain Fed)					
Year/Month	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Yearly Ave.
2002	601	597	589	658	611
2003	669	700	753	821	736
% Chg.	11%	17%	28%	25%	20%
2004	920	869	835	864	872
% Chg.	38%	24%	11%	5%	18%
2005	877	832	821	934	866
% Chg.	-5%	-4%	-2%	8%	-1%
2006	949	904	903	966	930
% Chg.	8%	9%	10%	3%	7%
Full Set, Australian Beef, Chilled, (Grass Fed)					
Year/Month	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Yearly Ave.
2002	563	510	489	602	541
2003	631	615	643	725	654
% Chg.	12%	21%	31%	20%	21%
2004	773	733	699	748	738
% Chg.	22%	19%	9%	3%	13%
2005	771	672	664	786	723

% Chg.	-0%	-8%	-5%	5%	-2%
2006	812	761	792	872	810
% Chg.	5%	13%	19%	11%	12%
Navel-end Brisket, Australian Beef, Chilled					
Year/Month	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Yearly Ave.
2002	413	363	357	431	391
2003	432	446	509	621	502
% Chg.	5%	23%	42%	44%	28%
2004	759	958	737	712	792
% Chg.	76%	115%	45%	15%	58%
2005	769	715	715	711	728
% Chg.	1%	-25%	-3%	-0%	-8%
2006	703	696	753	743	724
% Chg.	-9%	-3%	5%	5%	-1%
Strip Loin, Australian Beef, Chilled					
Year/Month	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Yearly Ave.
2002	1,018	786	993	973	943
2003	1,032	1,108	1,042	1,103	1,071
% Chg.	1%	41%	5%	13%	14%
2004	1,289	1,177	1,185	1,245	1,224
% Chg.	25%	6%	14%	13%	14%
2005	1,328	1,118	1,239	1,279	1,241
% Chg.	3%	-5%	5%	3%	1%
2006	1,495	1,333	1,294	1,315	1,360
% Chg.	13%	19%	4%	3%	10%
ALIC Monthly					

Table 6. Average Wholesale Price of Imported Beef (Australian Frozen Cuts)

					Unit: Yen per Kg.
Chuck & Blade, Australian Beef, Frozen					
Year/Month	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Yearly Ave.
2002	416	411	370	412	402
2003	419	405	425	450	425
% Chg.	1%	-1%	15%	9%	6%
2004	520	517	552	584	543
% Chg.	24%	27%	30%	30%	28%
2005	562	495	494	547	524
% Chg.	8%	-4%	-11%	-6%	-3%
2006	573	532	543	591	560
% Chg.	2%	8%	10%	8%	7%

Top Side, Australian Beef, Frozen					
Year/Month	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Yearly Ave.
2002	482	483	478	484	481
2003	503	501	514	525	511
% Chg.	4%	4%	8%	8%	6%
2004	570	508	538	583	550
% Chg.	13%	1%	5%	11%	8%
2005	567	512	524	598	550
% Chg.	-0%	1%	-3%	3%	0%
2006	624	583	634	686	632
% Chg.	10%	14%	21%	15%	15%
Trimming, Australian Beef, Frozen					
Year/Month	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Yearly Ave.
2002	381	375	343	340	360
2003	343	352	349	404	362
% Chg.	-10%	-6%	2%	19%	1%
2004	417	432	445	464	440
% Chg.	22%	23%	28%	15%	21%
2005	454	414	427	443	435
% Chg.	9%	-4%	-4%	-5%	-1%
2006	452	436	438	441	442
% Chg.	-1%	5%	2%	-0%	2%
ALIC Monthly					

Table 7. Australian Beef Exports to Japan

							Metric Ton (On Board Vessel Basis)
Annual	2004	2005	% Chg	2006	% Chg	05 Share	06 Share
	Jan/Dec	Jan/Dec	Jan/Dec	Jan/Dec	Jan/Dec	Jan/Dec	Jan/Dec
Chilled Beef	**207,839**	**223,333**	**7%**	**210,125**	**-6%**	**100%**	**100%**
Grass	79,335	81,665	3%	72,810	-11%	37%	35%
Grain fed	128,504	141,668	10%	137,315	-3%	63%	65%
Frozen Beef	**185,632**	**181,751**	**-2%**	**195,671**	**8%**	**100%**	**100%**
Grass	141,976	130,644	-8%	142,871	9%	72%	73%
Grain fed	43,656	51,107	17%	52,800	3%	28%	27%
TOTAL	**393,471**	**405,084**	**3%**	**405,796**	**0%**	**100%**	**100%**
Grass	221,311	212,309	-4%	215,681	2%	52%	53%
Grain fed	172,160	192,775	12%	190,115	-1%	48%	47%
Source: Data by Meat Livestock Australia (Table compiled by post)							

Table 8-a. Japanese Chilled and Frozen Beef Combined Imports 2006 (Jan. – Dec.)

Unit: Metric Ton (Customs Clearance Basis)						
					% Change	
Rank	Country	2004	2005	2006	- 06/05 -	- 06 Share -
		Jan/Dec	Jan/Dec	Jan/Dec	Jan/Dec	Jan/Dec
0	--World--	431,818	459,919	460,620	0%	100%
1	Australia	394,068	411,359	405,620	-1%	88%
2	New Zealand	33,569	37,953	37,931	0%	8%
3	**United States**	**1,276**	**42**	**7,321**	**17419%**	**2%**
4	Mexico	1,772	6,740	6,252	-7%	1%
5	Canada	0	5	2,087	42561%	0%
6	Vanuatu	448	534	547	3%	0%
7	Chile	665	2,942	483	-84%	0%
8	Others	20	344	379	10%	0%
Product HS Code: HS 0201, HS 0202						
Source of data: Japan Customs (World Trade Atlas)						

Table 8-b. Japanese Chilled Beef Imports 2006 (Jan. – Dec.)

Unit: Metric Ton (Customs Clearance Basis)						
					% Change	
Rank	Country	2004	2005	2006	- 06/05 -	- 06 Share -
		Jan/Dec	Jan/Dec	Jan/Dec	Jan/Dec	Jan/Dec
0	--World--	208,051	230,018	223,156	-3%	100%
1	Australia	203,618	222,893	208,245	-7%	93%
2	New Zealand	3,789	4,530	5,625	24%	3%
3	**United States**	**0**	**42**	**5,089**	**12079%**	**2%**
4	Mexico	644	2,530	2,471	-2%	1%
5	Canada	0	5	1,723	35120%	1%
6	Others	0	18	3	-86%	0%
Product HS Code: HS 0201						
Source of data: Japan Customs (World Trade Atlas)						

Table 8-c. Japanese Frozen Beef Imports 2006 (Jan. – Dec.)

Unit: Metric Ton (Customs Clearance Basis)						
					% Change	
Rank	Country	2004	2005	2006	- 06/05 -	- 06 Share -
		Jan/Dec	Jan/Dec	Jan/Dec	Jan/Dec	Jan/Dec
0	--World--	223,766	229,901	237,464	3%	100%
1	Australia	190,450	188,466	197,376	5%	83%
2	New Zealand	29,780	33,424	32,305	-3%	14%
3	Mexico	1,127	4,209	3,781	-10%	2%

4	**United States**	**1,276**	**0**	**2,232**	**#DIV/0!**	**1%**
5	Vanuatu	448	534	547	3%	0%
6	Chile	665	2,924	483	-83%	0%
7	Canada	0	0	364	#DIV/0!	0%
8	Others	20	344	376	9%	0%
Product HS Code: HS 0202						
Source of data: Japan Customs (World Trade Atlas)						

Table 8-d. Japanese Imports of Prepared and Processed Beef Products 2006 (Jan. – Dec.)

Unit: Metric Ton (Customs Clearance Basis)						
					% Change	
Rank	Country	2004	2005	2006	- 06/05 -	- 06 Share -
		Jan/Dec	Jan/Dec	Jan/Dec	Jan/Dec	Jan/Dec
0	--World--	16,223	23,524	18,708	-20%	100%
1	Australia	8,299	7,775	8,396	8%	45%
2	China	4,240	10,276	6,294	-39%	34%
3	Brazil	1,875	3,126	2,249	-28%	12%
4	New Zealand	1,105	1,302	1,466	13%	8%
5	Others	704	1,046	303	-71%	2%
HS Product Code: HS 160250, HS 021020						
Source of data: Japan Customs (World Trade Atlas)						

Pork Section

2007 Pork Market Outlook

Japanese Meat Trade Continues Undergoing Adjustments in 2007

Japan's pork trade in 2007 will continue to be shaped by the increased level of tariff collections and enforcement under the so-called 'gate price system.' The system began in 1995 as a mechanism negotiated in the Uruguay Round and strongly resembles a variable levy. If pork meat imports, priced at entry into Japan, are valued at or above the gate price, then they pay a simple tariff of 4.3 percent. If their value is lower than the gate price, the importer must pay the difference between the import value and the gate price as a duty. The 4.3 percent specific duty is then also applied. In practice, the gate price is compared with the average value of the invoice on a shipment, which is usually one or more containers. The system puts disproportionately high tariffs on lower-valued pork cuts.

Legitimate traders carefully mix lower valued cuts, which are in demand by Japan's meat processing industry, with higher valued cuts so as to come as close as possible to the gate price. However, a common way to evade the duty is by over-invoicing. A broker or a trading company will exaggerate the invoice price so that the value of the shipment meets the gate price and is exempt from the costly variable levy. Japan has taken extraordinary steps in recent years to stem this practice, including holding end users more responsible for ensuring the duty is paid, but fraud still apparently exists. In 2007, we believe increased enforcement will continue to put pressure on imports of lower cost pork for processing and will further stimulate a growing trade in sausage products.

Modest Decline in Total Pork Consumption Forecast in 2007

Total pork consumption in 2007 is forecast down by 2% to 2.404 million MT. Total imports are forecast modestly lower by 2% to 1.121 million MT (Generic Pork; down 3% at One million MT, Prepared and Processed Products; up 10% at 121,000 MT).

The decline is mainly due to modest imports of frozen pork. On the other hand, imports of chilled pork are projected modestly up. This will benefit U.S. and Canadian sales of chilled pork (which tends to be of higher value).

Monthly imports of generic pork, chilled and frozen combined, are estimated at around 83,000 MT on the average through 2007. Year-end stocks are forecast down by 18% to a tight 200,000 MT. Meanwhile, Japanese imports of prepared and processed products will continue to grow, mostly because of expanded sales of seasoned ground pork. Seasoned ground pork is not subject to the gate price system and has a 20% ad valorem duty.

Domestic Slaughter Forecast Lower Slightly in 2007

Domestically, Japan will see a slight decline in hog slaughter numbers, projected at 16.150 million head (or 1.24 million MT). The decline is mainly due to the continued exist from the industry of small and medium scale producers. Forecast household consumption and domestic hog slaughter prices are flat.

Market Opportunities Exist for U.S. (Non-Beef) Sausage Products

Building on last year's trend, sausage products, mainly from China and other Asian countries, are expected to make continued inroads into the Japanese market. Sausage products are not subject to the gate price system and have a 10% ad valorem duty. Market opportunities exist for U.S. sausage products, keeping in mind that no beef-containing processed products are currently allowed.

No Pork Safeguard Envisaged in JFY 2007

The import pork safeguard is not expected to be triggered in JFY 2007 (See table 9).

2006 Situation Summary

Revised Swine and pork PS&D figures for CY 2005 and 2006 are constructed based on preliminary production, trade, and stock data available to date.

Total Pork Consumption Fell Slightly in 2006

In 2006, total pork consumption was down 2% to 2.449 million MT primarily due to a large cut back in the imports of frozen pork. The government's crack down on illegal pork imports had the effect limiting imports of frozen pork for use in manufacturing processed meat products. As a result, abnormally large stocks declined by 19% to 243,000 MT by-year end (See table 11).

Meanwhile, relatively stable household consumption in 2006 held average wholesale prices of domestic pork unchanged (See table 2 and 10). Also, relatively solid food service sector demand for imported chilled pork led to increases seen in imports of chilled pork from the United States, Canada and Mexico.

Imports of Raw Material Frozen Pork Substantially Lowered in 2006

Total pork imports in 2006 dropped significantly, down 14% from last year to 1.145 million MT.

Generic Pork imports were down to 1.035 million MT, or 17%. Country shares were: United States (35%), Denmark (23%) and Canada (21%). Prepared and Processed pork imports were 110,000 MT, up 22%. Country shares were: United States (61%), Canada (18%), China (13%), (See table 12-a).

Solid increases seen in imports of chilled pork (up 10%) did not offset a large decline in frozen pork imports (down 25%). The frozen pork accounted for about 70% of total generic pork imports. Denmark, the largest supplier (33%) of pork for processing, was most affected by increased gate price enforcement (See table 12-c). Major ham and sausage manufacturers in Japan added increased raw material cost of 5-10% on to their products and consumption of processed products, except bacon, was sluggish throughout 2006. This was also reflected in the household consumption data of processed meat products (See table 2). Chilled pork accounted about 30% of imports with the single largest supplier being the United States (69%), followed by Canada (24%) and Mexico (6%) (See Table 12-b). The United States was a major beneficially in 2006 from Japan's increased demand for seasoned ground pork, a popular alternative to frozen generic picnic cuts for sausage making.

While not reflected in the PS&D, Japanese imports of sausage products surged 21% from a year ago to 40,695 MT on a customs clearance basis. Imports from China shot up 44% to 26,740 MT followed by U.S. sales of 6,052 MT, which was up 3%. Given continues difficulties of importing inexpensive raw materials, this segment of the trade is expected to expand further in the future.

Domestic Hog Slaughter and Pork Production Sustained in 2006

Slightly smaller sow figures at the year beginning only trimmed domestic hog slaughters slightly to 16.210 million heads (preliminary) and the domestic pork production was flat at 1.247 million MT in 2006.

Table 9. Japanese Pork Safeguard Monitor for JFY 2004-2006

Pork Safeguard Trigger Levels for JFY 2006 and Actual Imports					
			Unit: Metric Ton (Customs Clearance Basis)		
	Trigger Level	Cum. Total	April	May	June
	Quarterly Cum.	Actual Entry			
I (Apr. - Jun.)	335,377	196,088	65,720	66,289	64,079
			July	August	September
I - II (Apr. - Sept.)	589,122	359,605	52,441	63,117	47,959
			October	November	December
I - III (Apr. - Dec.)	797,056	535,060	54,693	62,701	58,061
			January	February	March
I - IV (Apr. - Mar.)	1,002,164	535,060	0	0	0

Pork Safeguard Trigger Levels for JFY 2007 and Actual Imports					
			Unit: Metric Ton (Customs Clearance Basis)		
	Trigger Level	Cum. Total	April	May	June
	Quarterly Cum.	Actual Entry			
I (Apr. - Jun.)	318,028	0			
			July	August	September
I - II (Apr. - Sept..)	554,805	0	0	0	0
			October	November	December
I - III (Apr. - Dec.)	766,990	0	0	0	0
			January	February	March
I - IV (Apr. - Mar.)		0	0	0	0
Source: Ministry of Finance					

Table 10. Average Wholesale Price of Domestic Pork Carcass

					Unit: Yen per Kg.
Excellent Grade					
Year/Month	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Yearly Ave.
2002	498	559	510	396	491
2003	413	460	426	397	424
% Chg	-17%	-18%	-16%	0%	-14%
2004	498	487	523	424	483
% Chg	21%	6%	23%	7%	14%
2005	472	496	509	443	480
% Chg	-5%	2%	-3%	4%	-1%
2006	442	501	513	444	475
% Chg	-6%	1%	1%	0%	-1%
Medium Grade					
Year/Month	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Yearly Ave.
2002	459	525	469	355	452
2003	362	408	359	332	365
% Chg	-21%	-22%	-23%	-7%	-19%
2004	438	427	465	381	428
% Chg	21%	5%	29%	15%	17%
2005	426	464	482	416	447
% Chg	-3%	9%	4%	9%	5%
2006	412	476	488	417	448
% Chg	-3%	3%	1%	0%	0%
Source: ALIC Monthly (Original monthly data converted into quarterly by post)					

Table 11. Japanese Monthly Pork Stock Estimates

Unit: Metric Ton (Carcass Equivalent)							
Month/Year	**2003**	**2004**	**% Chg.**	**2005**	**% Chg.**	**2006**	**% Chg.**
Jan.	210,374	212,876	1%	242,553	14%	298,709	23%
Feb.	209,909	209,590	-0%	247,297	18%	292,199	18%
Mar.	202,273	215,531	7%	253,109	17%	299,410	18%
Apr.	239,071	259,394	9%	300,199	16%	300,557	0%
May	257,789	295,539	15%	326,394	10%	308,479	-5%
Jun.	252,813	315,399	25%	324,949	3%	306,377	-6%
Jul.	303,764	334,969	10%	344,059	3%	296,773	-14%
Aug.	272,654	304,363	12%	338,291	11%	285,637	-16%
Sept.	253,967	273,546	8%	322,837	18%	262,590	-19%
Oct.	233,366	244,701	5%	327,361	34%	248,823	-24%
Nov.	221,971	225,691	2%	321,483	42%	245,769	-24%
Dec.	210,947	222,780	6%	299,774	35%	242,840	-19%
Source: ALIC Monthly Statistics							

Table 12-a. Japanese Chilled and Frozen Pork Combined Imports 2006 (Jan. – Dec.)

Unit: Metric Ton (Customs Clearance Basis)						
					% Change	
Rank	**Country**	**2004**	**2005**	**2006**	**- 06/05 -**	**- 06 Share -**
		Jan/Dec	**Jan/Dec**	**Jan/Dec**	**Jan/Dec**	**Jan/Dec**
0	--World--	863,801	873,115	724,903	-17%	100%
1	**United States**	**256,110**	**287,909**	**252,268**	**-12%**	**35%**
2	Denmark	267,695	230,976	168,037	-27%	23%
3	Canada	184,916	195,235	151,712	-22%	21%
4	Chile	38,954	51,717	50,645	-2%	7%
5	Mexico	32,665	35,189	40,359	15%	6%
6	Hungary	17,257	17,350	12,046	-31%	2%
7	France	12,071	10,296	10,137	-2%	1%
8	Ireland	8,580	11,179	9,599	-14%	1%
9	Spain	2,144	4,551	8,199	80%	1%
10	Austria	9,093	12,543	7,404	-41%	1%
11	Netherlands	12,276	4,557	4,565	0%	1%
12	Finland	5,284	5,140	3,112	-39%	0%
13	Sweden	2,056	975	2,471	153%	0%
14	Australia	8,449	2,792	2,204	-21%	0%
15	Others	6,252	2,706	2,143	-21%	0%
Product HS Code: HS 0203						

Source of data: Japan Customs (World Trade Atlas)

Table 12-b. Japanese Chilled Pork Imports 2006 (Jan. – Dec.)

						Unit: Metric Ton (Customs Clearance Basis)
					% Change	
Rank	Country	2004	2005	2006	- 06/05 -	- 06 Share -
		Jan/Dec	Jan/Dec	Jan/Dec	Jan/Dec	Jan/Dec
0	--World--	193,575	201,671	222,529	10%	100%
1	**United States**	**137,298**	**145,861**	**154,410**	**6%**	**69%**
2	Canada	39,449	42,838	53,806	26%	24%
3	Mexico	9,597	10,531	12,328	17%	6%
4	Australia	6,755	2,173	1,678	-23%	1%
5	Others	476	269	307	14%	0%
Product HS Code: HS 0203.11, HS 0203.12, and HS 0203.19						
Source of data: Japan Customs (World Trade Atlas)						

Table 12-c. Japanese Frozen Pork Imports 2006 (Jan. – Dec.)

						Unit: Metric Ton (Customs Clearance Basis)
					% Change	
Rank	Country	2004	2005	2006	- 06/05 -	- 06 Share -
0	--World--	670,226	671,444	502,374	-25%	100%
1	Denmark	267,355	230,763	167,851	-27%	33%
2	Canada	145,467	152,398	97,906	-36%	19%
3	**United States**	**118,812**	**142,048**	**97,858**	**-31%**	**19%**
4	Chile	38,954	51,716	50,621	-2%	10%
5	Mexico	23,068	24,658	28,032	14%	6%
6	Hungary	17,257	17,350	12,022	-31%	2%
7	France	12,065	10,287	10,122	-2%	2%
8	Ireland	8,580	11,179	9,599	-14%	2%
9	Spain	2,106	4,508	8,144	81%	2%
10	Austria	9,093	12,543	7,404	-41%	1%
11	Netherlands	12,276	4,557	4,565	0%	1%
12	Finland	5,284	5,140	3,112	-39%	1%
13	Sweden	2,056	975	2,471	153%	0%
14	Others	7,854	3,321	2,667	-20%	1%
HS Product Code: HS 0203.21, HS 0203.22 and HS 0203.29						
Source of data: Japan Customs (World Trade Atlas)						

Table 12-d. Japanese Imports of Prepared and Processed Pork Products 2006 (Jan. – Dec.)

Unit: Metric Ton (Customs Clearance Basis)

Rank	Country	2004	2005	2006	% Change - 06/05 -	- 06 Share -
		Jan/Dec	Jan/Dec	Jan/Dec	Jan/Dec	Jan/Dec
0	--World--	46,513	63,067	76,651	22%	100%
1	United States	24,601	30,114	46,609	55%	61%
2	Canada	9,033	16,672	14,025	-16%	18%
3	China	8,965	9,326	10,085	8%	13%
4	Chile	208	1,678	1,968	17%	3%
5	Italy	933	1,102	1,264	15%	2%
6	Mexico	247	382	984	158%	1%
7	Thailand	247	243	498	105%	1%
8	Denmark	1,123	2,063	495	-76%	1%
9	Spain	145	162	256	58%	0%
10	Others	1,010	1,325	467	-65%	1%
Product HS Code: HS 0210.11, HS 0210.12, HS 0210.19 and HS 1602.42						
Source of data: Japan Customs (World Trade Atlas)						

Cattle PS&D Table

Japan

Animal Numbers, Cattle										
	2005	Revised		2006	Estimate		2007	Forecast		UOM
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	
Market Year Begin		01/2005	01/2005		01/2006	01/2006		01/2007	01/2007	MM/YYYY
Total Cattle Beg. Stks	4401	4401	4401	4390	4390	4390	4410	4410	4410	(1000 HEAD)
Dairy Cows Beg. Stocks	910	910	910	900	900	900	890	890	890	(1000 HEAD)
Beef Cows Beg. Stocks	623	623	623	621	621	621	620	620	620	(1000 HEAD)
Production (Calf Crop)	1415	1415	1415	1400	1400	1400	1390	1390	1390	(1000 HEAD)
Intra-EU Imports	0	0	0	0	0	0	0	0	0	(1000 HEAD)
Other Imports	25	25	25	28	28	28	30	30	30	(1000 HEAD)
Total Imports	25	25	25	28	28	28	30	30	30	(1000 HEAD)
Total Supply	5841	5841	5841	5818	5818	5818	5830	5830	5830	(1000 HEAD)
Intra EU Exports	0	0	0	0	0	0	0	0	0	(1000 HEAD)
Other Exports	0	0	0	0	0	0	0	0	0	(1000 HEAD)
Total Exports	0	0	0	0	0	0	0	0	0	(1000 HEAD)
Cow Slaughter	554	554	554	550	550	560	565	565	565	(1000 HEAD)
Calf Slaughter	9	9	9	10	10	7	10	10	10	(1000 HEAD)
Other Slaughter	667	667	671	650	650	649	660	660	655	(1000 HEAD)
Total Slaughter	1230	1230	1234	1210	1210	1216	1235	1235	1230	(1000 HEAD)
Loss	221	221	217	198	198	192	225	225	200	(1000 HEAD)
Ending Inventories	4390	4390	4390	4410	4410	4410	4370	4370	4400	(1000 HEAD)
Total Distribution	5841	5841	5841	5818	5818	5818	5830	5830	5830	(1000 HEAD)
CY Imp. from U.S.	0	0	0	0	0	0	0	0	0	(1000 HEAD)
CY. Exp. to U.S.	0	0	0	0	0	0	0	0	0	(1000 HEAD)

(Not USDA Official Data)

Beef PS&D Table

Japan Meat, Beef and Veal										
	2005	Revised		2006	Estimate		2007	Forecast		UOM
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	
Market Year Begin		01/2005	01/2005		01/2006	01/2006		01/2007	01/2007	MM/YYYY
Slaughter (Reference)	1230	1230	1234	1210	1210	1216	1235	1235	1230	(1000 HEAD)
Beginning Stocks	90	89	89	89	89	89	91	91	105	(1000 MT CWE)
Production	500	500	500	495	495	497	505	505	500	(1000 MT CWE)
Intra-EU Imports	0	0	0	0	0	0	0	0	0	(1000 MT CWE)
Other Imports	700	700	700	693	693	692	765	765	720	(1000 MT CWE)
Total Imports	700	700	700	693	693	692	765	765	720	(1000 MT CWE)
Total Supply	1290	1289	1289	1277	1277	1278	1361	1361	1325	(1000 MT CWE)
Intra EU Exports	0	0	0	0	0	0	0	0	0	(1000 MT CWE)
Other Exports	0	0	0	0	0	0	0	0	0	(1000 MT CWE)
Total Exports	0	0	0	0	0	0	0	0	0	(1000 MT CWE)
Human Dom. Consumption	1201	1200	1200	1186	1186	1173	1256	1256	1195	(1000 MT CWE)
Other Use, Losses	0	0	0	0	0	0	0	0	35	(1000 MT CWE)
Total Dom. Consumption	1201	1200	1200	1186	1186	1173	1256	1256	1230	(1000 MT CWE)
Ending Stocks	89	89	89	91	91	105	105	105	95	(1000 MT CWE)
Total Distribution	1290	1289	1289	1277	1277	1278	1361	1361	1325	(1000 MT CWE)
CY Imp. from U.S.	0	0	0	14	14	10	114	114	57	(1000 MT CWE)
CY. Exp. to U.S.	0	0	0	0	0	0	0	0	0	(1000 MT CWE)

(Not Official USDA Data)

Swine PS&D Table

Japan Animal Numbers, Swine									
	2005	Revised		2006	Estimate		2007	Forecast		UOM
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	
Market Year Begin		01/2005	01/2005		01/2006	01/2006		01/2007	01/2007	MM/YYYY
Total Beginning Stocks	9550	9600	9600	9620	9620	9620	9600	9600	9610	(1000 HEAD)
Sow Beginning Stocks	910	910	910	907	907	907	905	905	900	(1000 HEAD)
Production (Pig Crop)	17000	17000	17000	16900	16900	16950	16850	16850	16850	(1000 HEAD)
Intra-EU Imports	0	0	0	0	0	0	0	0	0	(1000 HEAD)
Other Imports	0	0	0	0	0	0	0	0	0	(1000 HEAD)
Total Imports	0	0	0	0	0	0	0	0	0	(1000 HEAD)
Total Supply	26550	26600	26600	26520	26520	26570	26450	26450	26460	(1000 HEAD)
Intra EU Exports	0	0	0	0	0	0	0	0	0	(1000 HEAD)
Other Exports	0	0	0	0	0	0	0	0	0	(1000 HEAD)
Total Exports	0	0	0	0	0	0	0	0	0	(1000 HEAD)
Sow Slaughter	0	0	0	0	0	0	0	0	0	(1000 HEAD)
Other Slaughter	16230	16240	16231	16170	16170	16210	16100	16100	16150	(1000 HEAD)
Total Slaughter	16230	16240	16231	16170	16170	16210	16100	16100	16150	(1000 HEAD)
Loss	700	740	749	750	750	750	750	750	750	(1000 HEAD)
Ending Inventories	9620	9620	9620	9600	9600	9610	9600	9600	9560	(1000 HEAD)
Total Distribution	26550	26600	26600	26520	26520	26570	26450	26450	26460	(1000 HEAD)
CY Imp. from U.S.	116	116	116	70	70	125	80	80	115	(HEAD)
CY. Exp. to U.S.	0	0	0	0	0	0	0	0	0	(1000 HEAD)

(Not Official USDA Data)

Pork PS&D Table

Japan Meat, Swine										
	2005	Revised		2006	Estimate		2007	Forecast		UOM
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	
Market Year Begin		01/2005	01/2005		01/2006	01/2006		01/2007	01/2007	MM/YYYY
Slaughter (Reference)	16230	16240	16231	16170	16170	16210	16100	16100	16150	(1000 HEAD)
Beginning Stocks	223	223	223	300	300	300	260	260	243	(1000 MT CWE)
Production	1245	1245	1245	1240	1240	1247	1235	1235	1240	(1000 MT CWE)
Intra-EU Imports	0	0	0	0	0	0	0	0	0	(1000 MT CWE)
Other Imports	1339	1337	1337	1250	1250	1145	1228	1228	1121	(1000 MT CWE)
Total Imports	1339	1337	1337	1250	1250	1145	1228	1228	1121	(1000 MT CWE)
Total Supply	2807	2805	2805	2790	2790	2692	2723	2723	2604	(1000 MT CWE)
Intra EU Exports	0	0	0	0	0	0	0	0	0	(1000 MT CWE)
Other Exports	0	0	0	0	0	0	0	0	0	(1000 MT CWE)
Total Exports	0	0	0	0	0	0	0	0	0	(1000 MT CWE)
Human Dom. Consumption	2507	2505	2505	2530	2530	2449	2501	2501	2404	(1000 MT CWE)
Other Use, Losses	0	0	0	0	0	0	0	0	0	(1000 MT CWE)
Total Dom. Consumption	2507	2505	2505	2530	2530	2449	2501	2501	2404	(1000 MT CWE)
Ending Stocks	300	300	300	260	260	243	222	222	200	(1000 MT CWE)
Total Distribution	2807	2805	2805	2790	2790	2692	2723	2723	2604	(1000 MT CWE)
CY Imp. from U.S.	454	454	454	436	436	427	436	436	414	(1000 MT CWE)
CY. Exp. to U.S.	0	0	0	0	0	0	0	0	0	(1000 MT CWE)

(Not Official USDA Data)